

FIG. 1

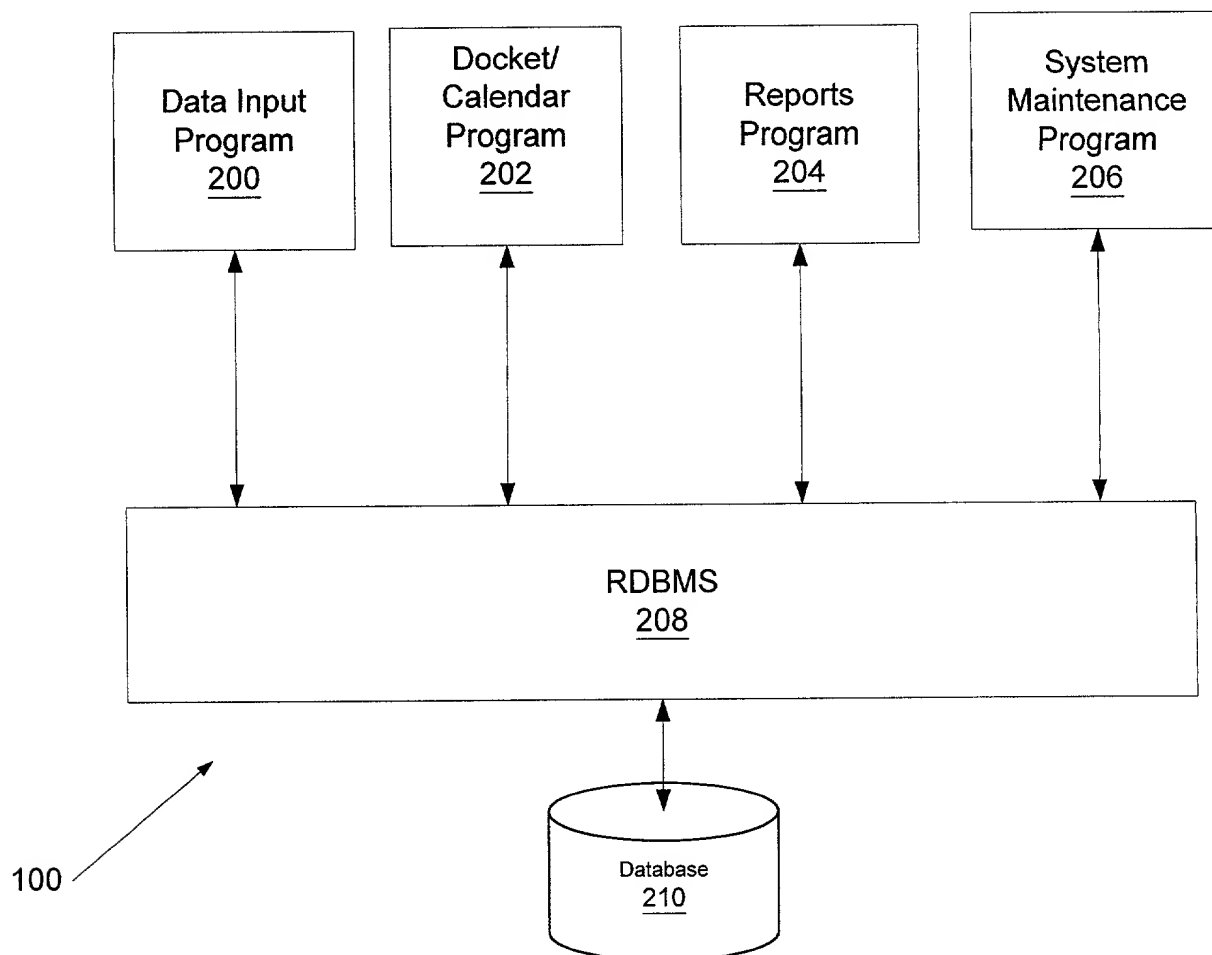


FIG. 2A

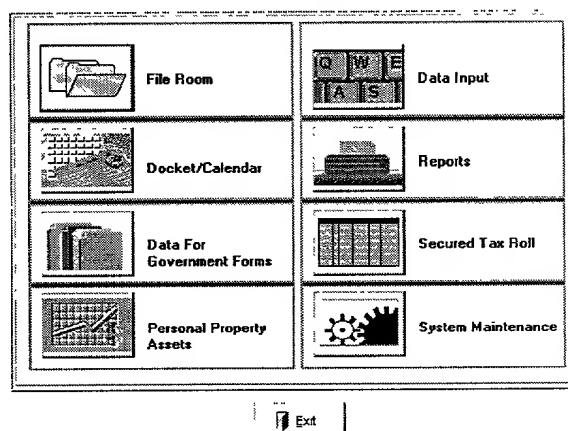


FIG. 2B Main Window

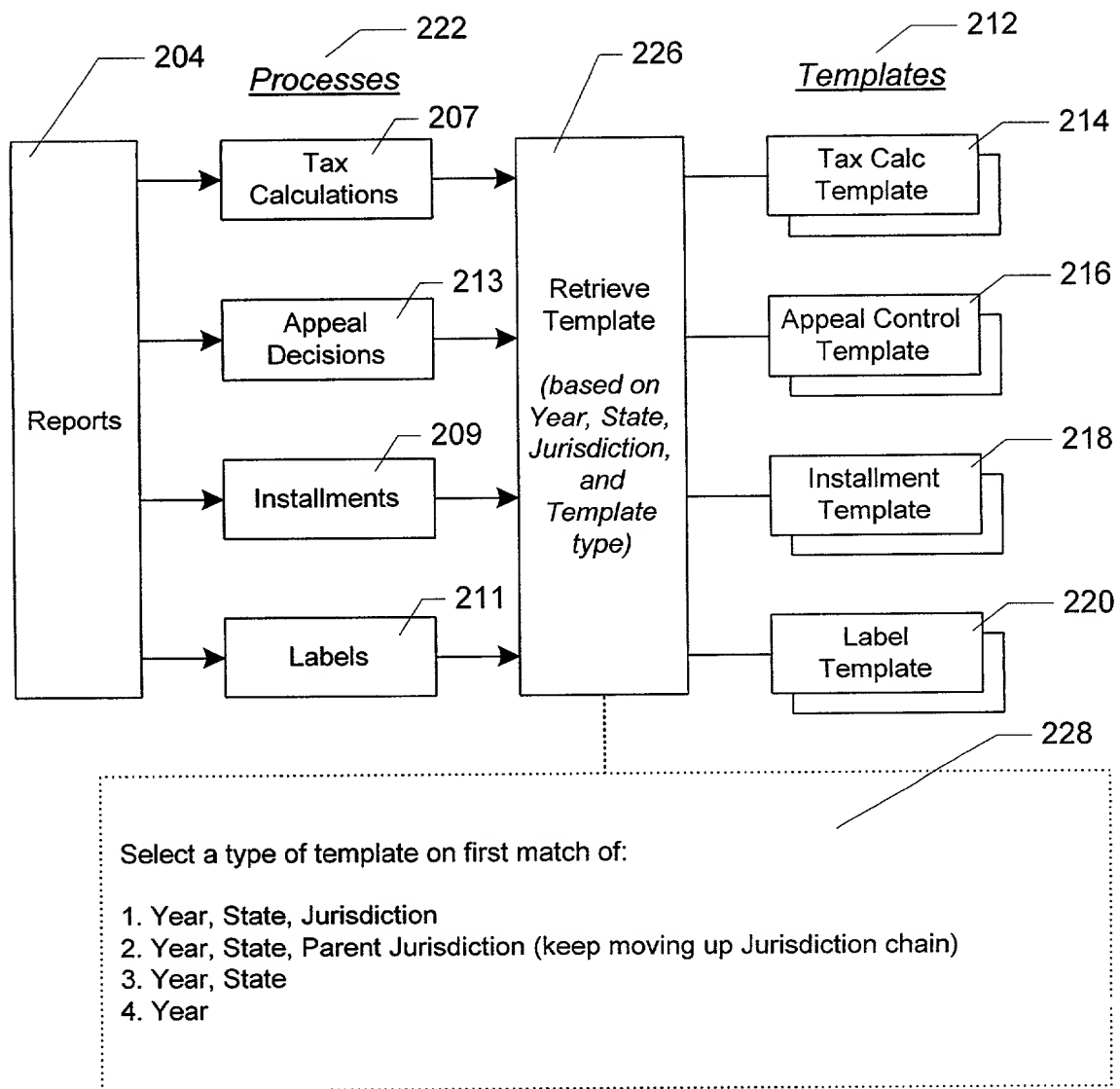


FIG. 3

FIG. 4 Parcel Record

FIG. 5 Calculate Tax

284

282

288

752

754

286

Assessment Track

Type: ☒ RE ☐ FP ☐ SUP ☐ NAV

Track ID: 1

Tax Bill: N25

Tax Bill Amt: 0.00

☒ Plug Tax Rate ☐ Projected

FCV Rate: 0.100000

LPV Rate: 0.052680

Eq. Rate: 1.000000

☐ This is a Parcel Track

This track supercedes:

On:

Descr: ☒ Include Assessment

Assessment Detail

Subtype	FCV	Asd FCV	FCV Imp	FCV Land	Calc Tax Amount
Interm	900,000	720,000	400,000	500,000	109,929.60

Change Order:

Projected values are marked with an asterisk (*)

Subtype: Interm Class: 5 ☐ Projected?

Actual Value		Land		Improvements	
FCV	900,000		500,000	400,000	FCV Ratio: 80.000000
Asd FCV	720,000		400,000	320,000	FCV Imp Ratio: ?
LPV	900,000		Asd LPV	720,000	LPV Ratio: 80.000000

FIG. 6 Assessments

292

290

Juris Cd	Dist Code	Description
MAR	031600	Light Industrial

Taxing Jurisdiction:

Dist Code: 031600

Class: 8

FCV Rate: 0.037028

LPV Rate: 0.102171

Rate Year: 1997

☐ Special District

Type:

Amount: ?

FIG. 7 Districts

296 298 284 294

Appeal Billing

Select a Track and/or Appeal:

Type	Track ID	Prorata	ECA	Appeal Reference
PERPROP	PP1	No	No	
A REAL	1	No	No	

A Tracks With Appeal Activity

300 Appeal Record

Appeal #: File #: Billing#: Date Created 12/28/98

Appeal Ref: Complainant:

Appeal Type: ☒ Standard Appeal ☐ Error Correction Appeal Override standard appeal at: Level 0 Hearing: 0

Appeal Reasons: Status:

Responsible Professional: ☒ Allocated?

Working Professional: ☐ Consultant Engaged

Consultant:

Appellant Code: ? Appellant Other Info:

Appeal Code: ? Appeal Other Info:

Refund Expected: ? Refund Received: ? Tax Credit: ?

Notes:

FIG. 8 Appeal Record

296 298 302

Appeal Billing

Select a Track and/or Appeal:

Type	Group	Prorata	ECA	Appeal Reference
A REAL		No	Yes	Garage Appeal

A Tracks Currently Under Appeal

304

Billing Information

Billing Type	Fee Agreement #1		Fee Agreement #2		Fee Agreement #3	
	Terms	Final Amount	Terms	Final Amount	Terms	Final Amount
Contingency <input type="checkbox"/>		0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00
Flat <input type="checkbox"/> 0.00	0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Hourly <input type="checkbox"/> 0.00	0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Form:			Form:		Form:	

☐ Multiple Years Final Year:

Referral

Firm: Contact:

☒ Contingency ☐ Flat Fee Amount: 0.00

FIG. 9 Appeal Billing

306

Select a Track and/or Appeal:

Type	Group	Prorata	ECA	Appeal Reference
A REAL		No	Yes	Garage Appeal

A Tracks Currently Under Appeal

Level	Hearing
1	1

Tax Amount: 1,000.00
Calc Tax Amount: ?

Appeal Level: 1
Appeal #: 3001

Hearing: 1
Class: 5

☒ File Appeal
☐ Litigation

☐ Outside Appeal
☐ Skip Level

	Requested	Actual Value	Land	Improvements	Date	Time
Requested FCV:	9,000	90,000	20,000	70,000	Filing Deadline:	12/01/97 12:00 PM
Requested Asd FCV:	900	90,000	20,000	70,000	Date Filed:	11/30/97 09:00 AM
FCV Ratio:	10.00000000	100.00000000		FCV Imp Ratio: ?	Hearing:	01/20/97 02:00 PM
Requested LPV:	8,000	89,000	Requested LPV Ratio:	99.00000000	Decision:	02/19/98 04:00 AM
Requested Asd LPV:	7,920	89,000	Actual LPV Ratio:	100.00000000		

FIG. 10 Appeal Process

307

Parcel	Property Name	Notes
000-00-0002	First Sub Parcel	
000-00-0003	Second Sub Parcel	
000-00-0004	Third Sub Parcel	
000-00-0005	Fourth Sub Parcel	gbsdfg
000-00-0006	Patti's Property	Just a really big property.

Switch To Subparcel...

Parcel: --

FIG. 11 Subparcels

308

310

Budget Name	Default
NAV Only	no
Personal Only	no
Real Only	yes
Sup Only	no

332

334

336

Open Budget

Select Default Budget

Combine Budgets

Create new budget parameters or edit existing ones. When you're ready, press 'Open Budget' to go in to the budget worksheet.

312

Budget Name:

Date Saved: Time Saved: 4:54 pm

Saved By: ☐ Combined Property

314

Annual Increase Rates:

FCV Increase: FCV Rate Increase: 316

LPV Increase: LPV Rate Increase: 320

Other Parameters:

Years To Forecast: ☐ Entire Property 318

Equalization Ratio: ☐ Track Installments 324

Budget On This Track Type:

☐ Real ☐ Personal ☐ Supplemental ☒ NAV 322

Notes:

328

FIG. 12 Create Budgets

338

Budget Worksheet for Scot Test

Property Year: 1997 State: AZ Juris Cdt: Mar Parcel: 222-22-222A

Prop Name: Parker Residence Prop ID:

Budget Name: Scot Test ☒ Real ☐ Personal ☐ Supplemental

TV Increase: 0.02000 OV Increase: 0.00000 Years To Forecast: 10

TV Rate Increase: 0.02000 OV Rate Increase: 0.00000 ☐ Combined Budget

Year	TV	TV Tax Rate	TV Ratio	OV	OV Tax Rate	OV Ratio	Tax
1997	100,000	0.030000	0.0000	200,000	0.000000	10.0000	300.00
1998	102,000	0.030500	0.0000	200,000	0.000000	10.0000	0.00
1999	104,040	0.031212	0.0000	200,000	0.000000	10.0000	0.00
2000	106,121	0.031836	0.0000	200,000	0.000000	10.0000	0.00
2001	108,243	0.032473	0.0000	200,000	0.000000	10.0000	0.00
2002	110,408	0.033122	0.0000	200,000	0.000000	10.0000	0.00
2003	112,616	0.033785	0.0000	200,000	0.000000	10.0000	0.00
2004	114,869	0.034461	0.0000	200,000	0.000000	10.0000	0.00
2005	117,166	0.035150	0.0000	200,000	0.000000	10.0000	0.00
2006	119,509	0.035853	0.0000	200,000	0.000000	10.0000	0.00

Budget Status: This budget is saved.

Tax Year	Installment	Tax	Date Due	Total Payment
1997	1	150.00	11/03/1997	150.00
1997	2	150.00	05/01/1998	300.00

Show:

☒ Tax From 1997

☐ Installments Due in 1997

340

342

344

346

Save Budget

Recalculate Budget

Restore to Last Saved

Start Over

Exit

FIG. 13 Budget Worksheet

348

IB	Required Date	Payee	Asmt Type	Track ID	Tax Bill#	Total Due	Disc Amount	Total Payments	Payment Date
1	07/01/97	AZ-MARICOPA-T	PERPROP	PP1	PP35163135163165	25,000.00	0.00	25,000.00	07/01/97
1	11/03/97	AZ-MARICOPA-T	REAL	1	N25	52,964.80	0.00	52,964.80	07/01/97
2	05/01/98	AZ-MARICOPA-T	REAL	1	N25	52,964.80	0.00	52,964.80	05/01/98

Asmt Types	<input checked="" type="radio"/> Real	<input type="radio"/> Supplemental	<input type="radio"/> Personal Property	<input type="radio"/> NAV	Track ID	1	Chrg Less Disc	130,929.60															
Installment	0	<input type="checkbox"/> Estimate?	Payee	AZ-MARICOPA-T			Payments	130,929.60															
Tax Bill#	?	Chk Req #	0	Check Num	0		Balance to Pay	0.00															
							Unpaid Amt	0.00															
<table border="1"> <thead> <tr> <th>Charges</th> <th>Discount</th> <th>Payments</th> </tr> </thead> <tbody> <tr> <td>Date</td> <td></td> <td></td> </tr> <tr> <td>Principal</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td>Penalty</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td>Interest</td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td>Other</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>				Charges	Discount	Payments	Date			Principal	0.00	0.00	Penalty	0.00	0.00	Interest	0.00	0.00	Other	0.00	0.00	Status: Released <input type="button" value="Auto Add"/> Entry Date: Mailed Date:	
Charges	Discount	Payments																					
Date																							
Principal	0.00	0.00																					
Penalty	0.00	0.00																					
Interest	0.00	0.00																					
Other	0.00	0.00																					

350

FIG. 14 Accounts Payable

352

Auto Add

A/P Entries

☒ Divide into Installments

☒ Include Discounts

☒ Include Payments

☐ Skip Tracks Already Brought Over

Track Types

☒ Real ☐ Supplemental ☒ Personal ☐ NAV

This procedure will automatically create A/P records. Payees must be setup for the jurisdiction. Also, the installment rules must be set up for this jurisdiction.

This jurisdiction is getting its rules from:

Arizona (Real)

Arizona (Personal)

FIG. 15 Auto Add

260 366 354

Client ID	Name	Active?
2802	HUNTERS GLEN APARTMENTS	Y
2803	LIBERTY II LP	Y
2804	FIRST UNION REAL ESTATE EQUI	Y
2805	RON SHOFFET	Y
2806	BANK ONE CHICAGO	Y
3040	3040 North 44th Street Partners	Y
777INVE	777 Investments LLC	Y
9998	Ashley Eleanor Meritt	Y

Client ID 1001

368

356

Client ID: 9998 Client Name: Ashley Eleanor Meritt Client #: 9998 Billing #: 9998 Contact:

Type: Client SubType: Current Responsible Attorney: RJT Rich J. Truly

358

Address: 8000 N. Barney Lane Notes:

Mailing Address: P O Box 7

City: Phoenix State: AZ Zip: 85020

E-Mail Address: ashley@naccarati.com

360

Phone: 602-900-9998 Extension:

362

Fax: 602-900-9997 Region: Active: Y

Parent ID: 9999 Path Naccarati Referral ID: Referring Individual: Referral Terms:

364

FIG. 16 Address Information

370

372 454 452 456 490

Contact Maintenance

Indv ID	Full Name
1	Jackie D. Quinn

Individual ID: Contact Type: Accounts Payable

Full Name: Title:

First Name: Last Name: Salutation:

Phone: Business Ext:

☐ Address is Same as Client

Address 1: Address 2: Address 3:

City: State: ZIP:

E-Mail:

371

FIG. 17 Contacts

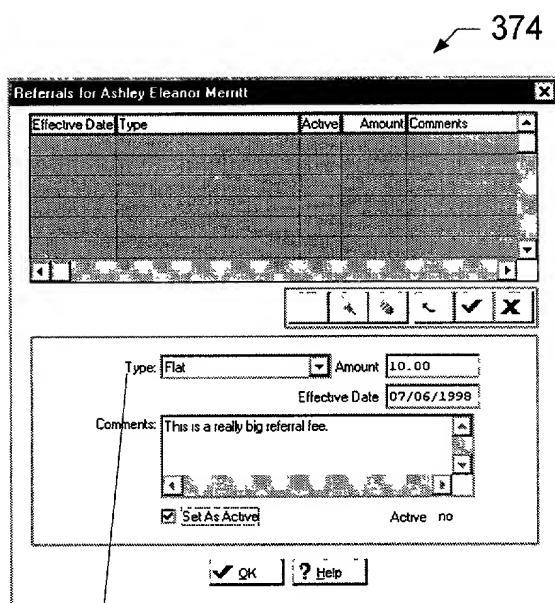


FIG. 18 Referral

Figure 1 shows a web browser window displaying a table of attorneys. The table has four columns: Individual Id, Name, Title, and Number. The rows list attorneys with their respective IDs, names, titles, and numbers. A search bar is visible at the bottom of the page.

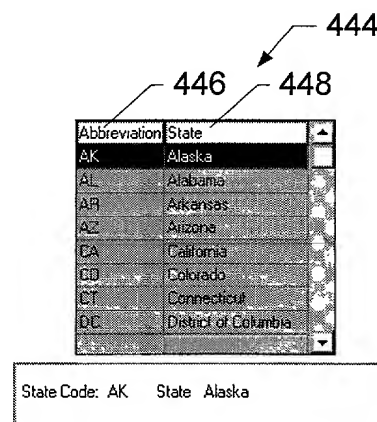
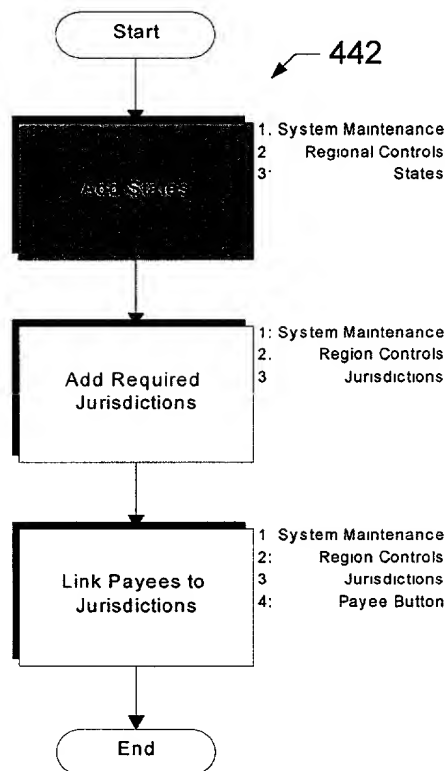
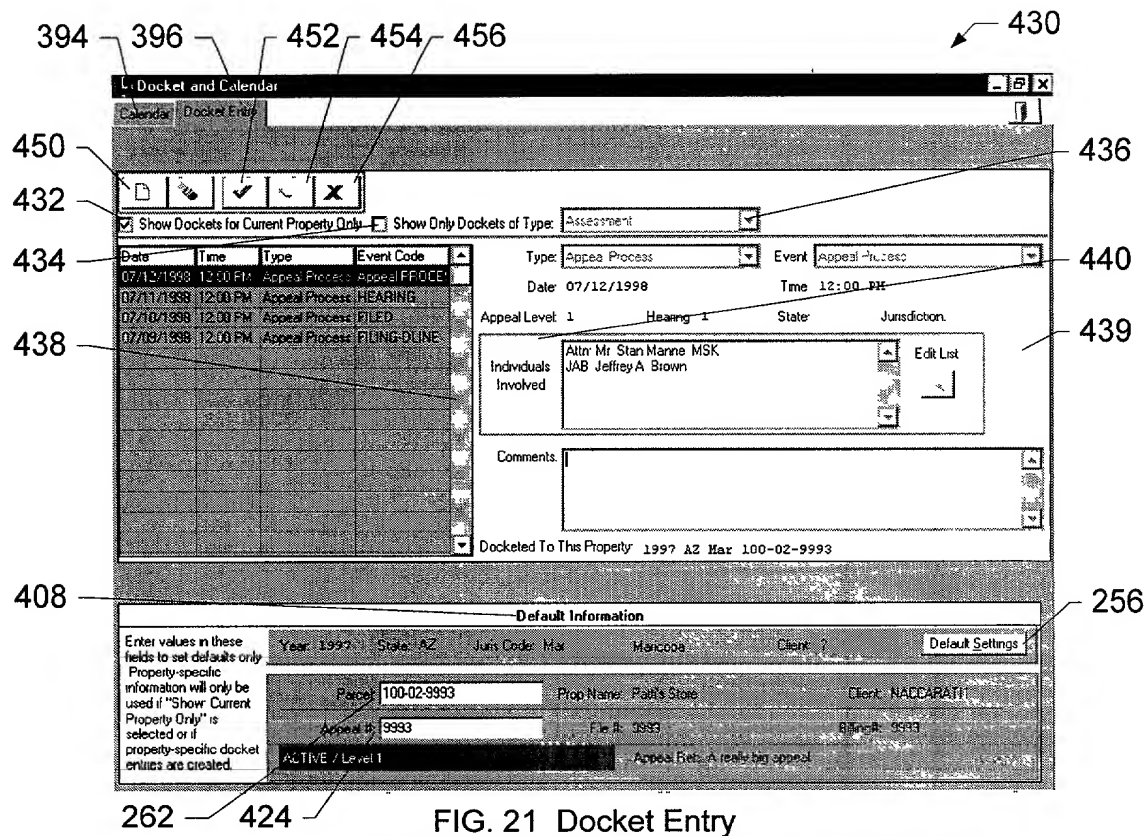
Individual Id	Name	Title	Number
MKP	Mikhail Krushov Persacki	Attorney	
MSK	Miya S. Kravsky	Attorney	102
PN	Patti Naccarati	Attorney	9999
RDN	Richard D. Neardood	Attorney	1
RDN1	R. Neardood	Attorney	1
RJT	Rich J. Truly	Attorney	103
WIS	W. I. Stein	Attorney	100
WIS	W. I. Stein Jr.	Attorney	101

Below the table, there is a search bar with the following fields:

- Individual Id:
- Title:
- Name:
- Number:
- Attorney:

FIG. 19 Working Professionals

FIG. 20 Calendar



406

458

234

Jurisdiction Maintenance

Other Edit Navigator Save

464

Abbreviation	State
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia

1 Select a state.

2. Select a jurisdiction.

Juris Code	Juris Name	Rate Year	Parent Jurisdiction
APA	Apache	1995	
CDC	Coconino	1995	
COCHISE	Cochise	1995	
GIL	Gila	1995	
GRA	Graham	1995	
GRE	Greenlee	1995	

Sub-Jurisdictions:

Juris Code	Juris Name

466

470

472

473

474

State: AZ

Rate Year: 0

Parent Juris Code:

Juris Cd:

Juris Name:

Parcel Format:

Default Payee ID: ?

Payee:

from 1 properties

460

465

468

494

FIG. 24 Jurisdiction Set Up

486

406

452

456

476

482

490

478

480

492

Payees for MAR/AZ

Payee ID: ☐ Set As Default

Payee ID	Name	Default
MCT	Maricopa County Tax Collector	Y

Payee Detail

Client ID	Client Name	Client #	Billing #
MCT	Maricopa County Tax Collector	MCT	MCT

Type: Collector SubType: [None] Responsible Individual: [None]

Address: 121 W. Jefferson

Mailing Address:

City: Phoenix State: AZ Zip: 85001

E-Mail Address: taxcollector@maricopacounty.com

Phone: 602-565-0000 Extension: 2

Fax: 602-565-0001 Region: Active: Y

Parent ID: Referral ID: ? Referring Individual:

Notes

Contacts

Referral Terms

FIG. 25 Jurisdiction Payee

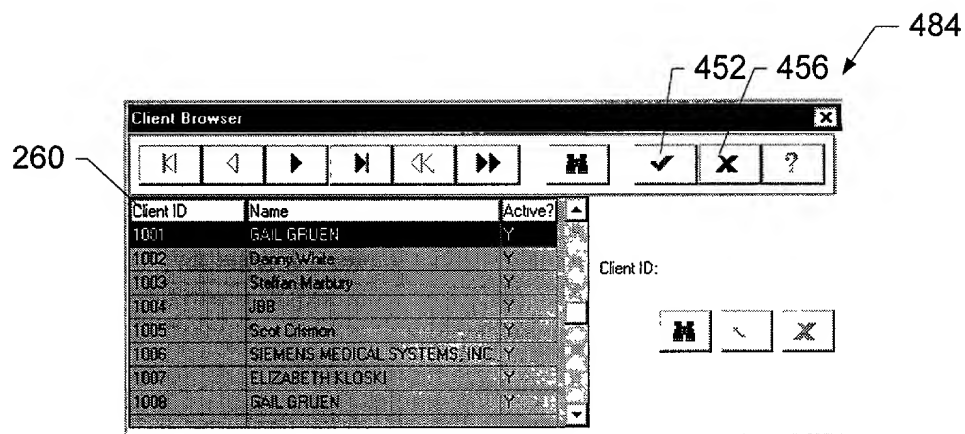


FIG. 26 Client Browser

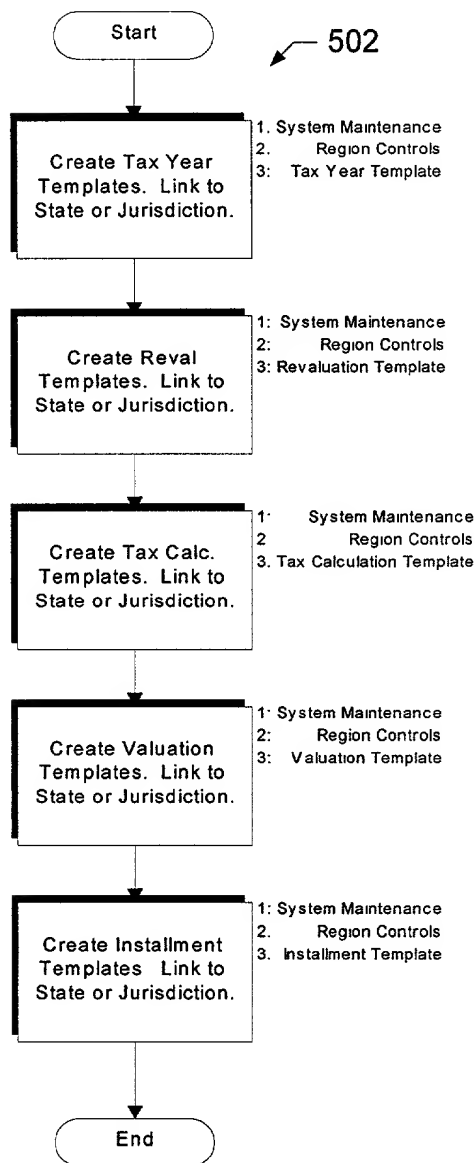
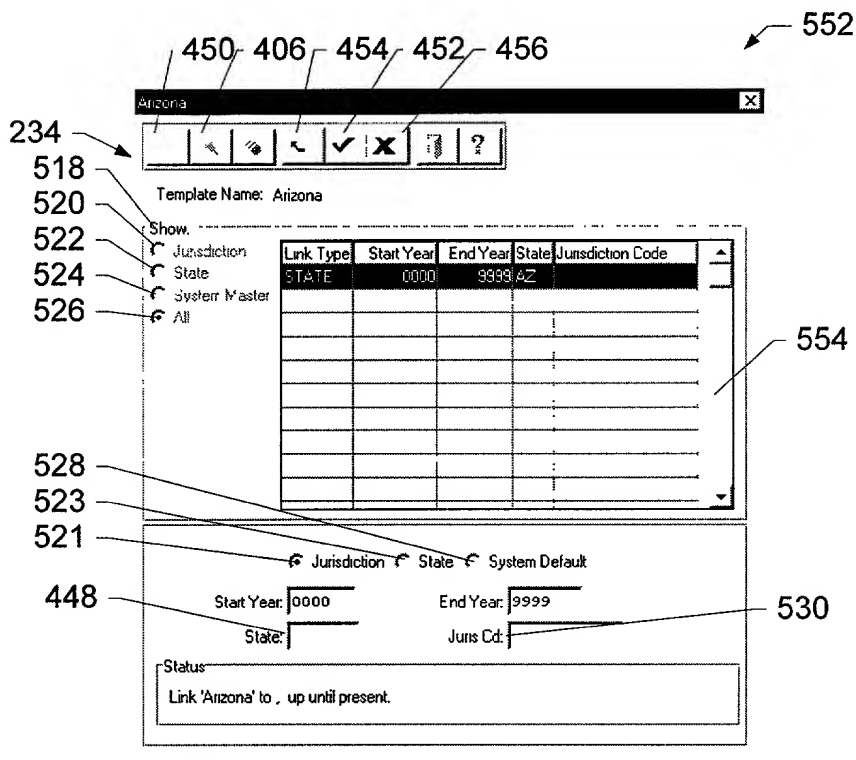
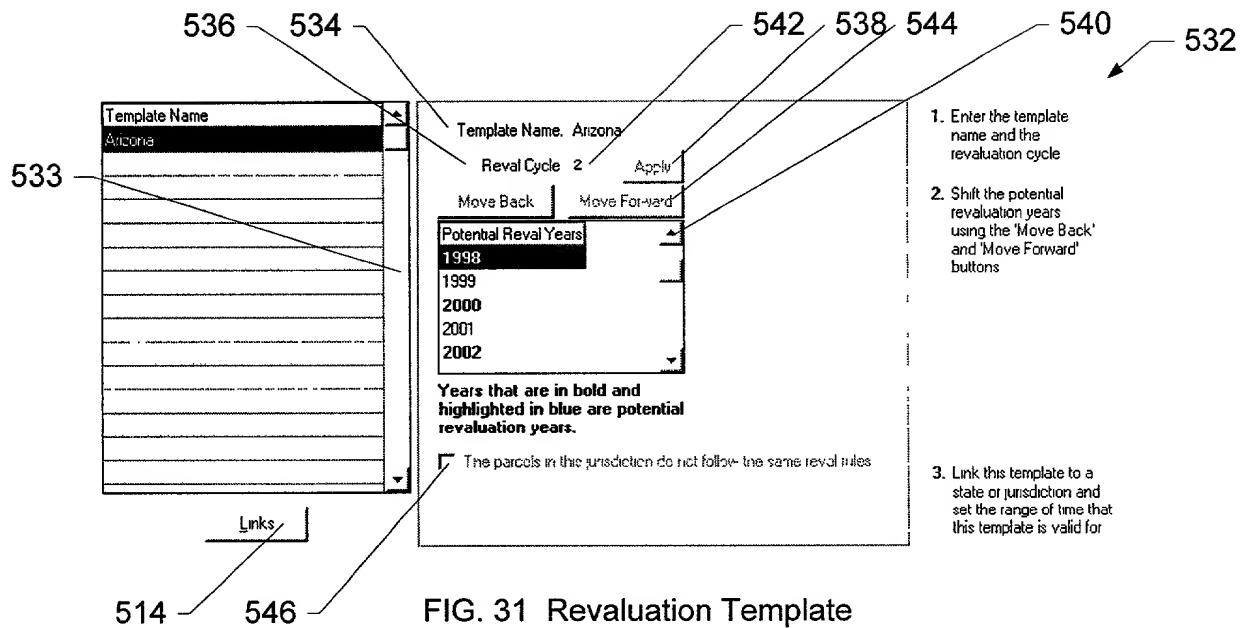


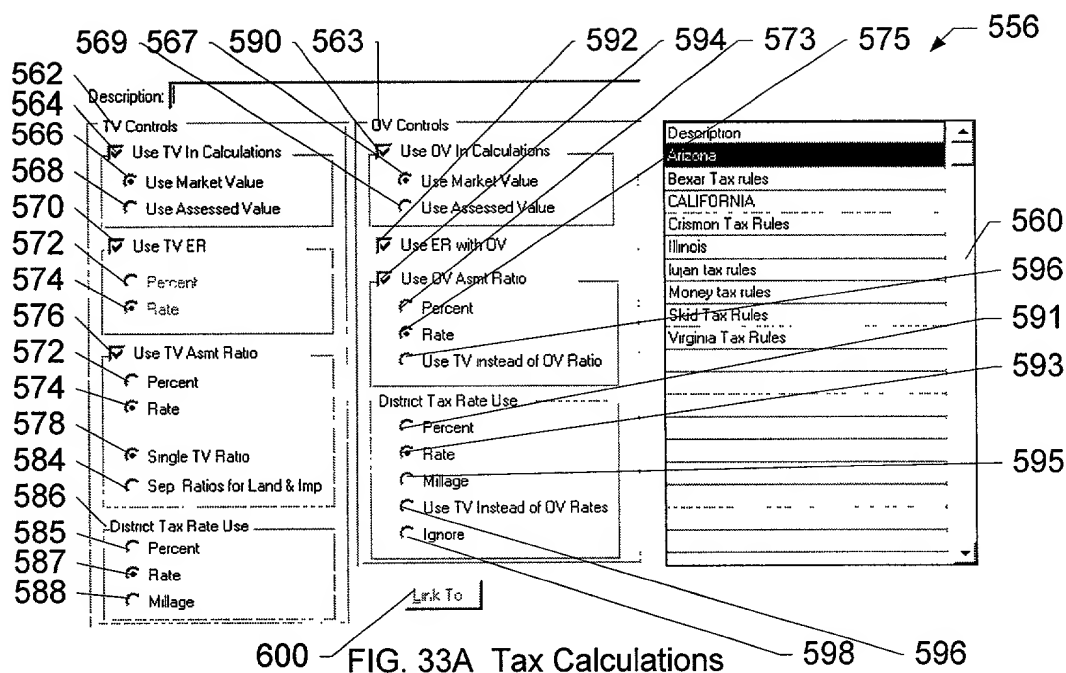
FIG. 27 Templates

FIG. 28 - TAX YEAR TEMPLATE

FIG. 29 Tax Year Template Link To

FIG. 30 Templates by Year





600 FIG. 33A Tax Calculations

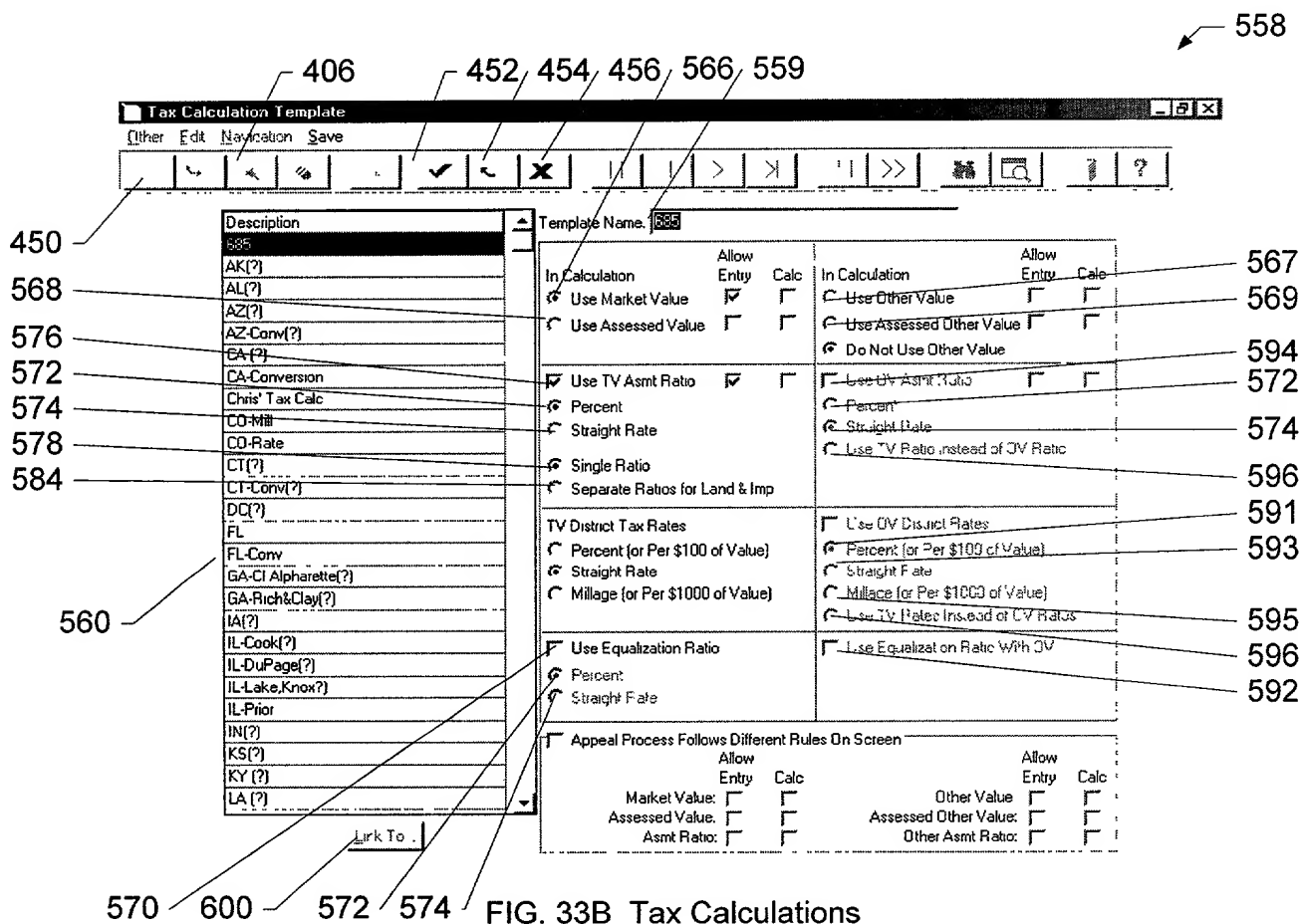
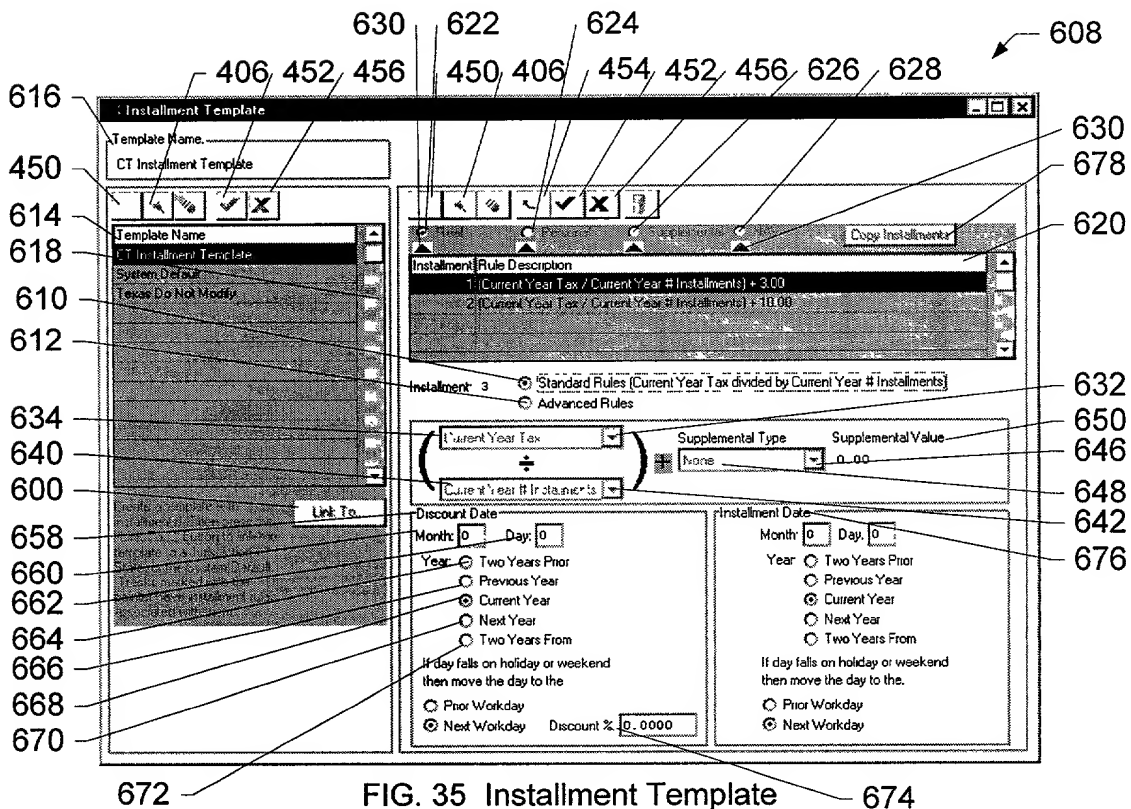
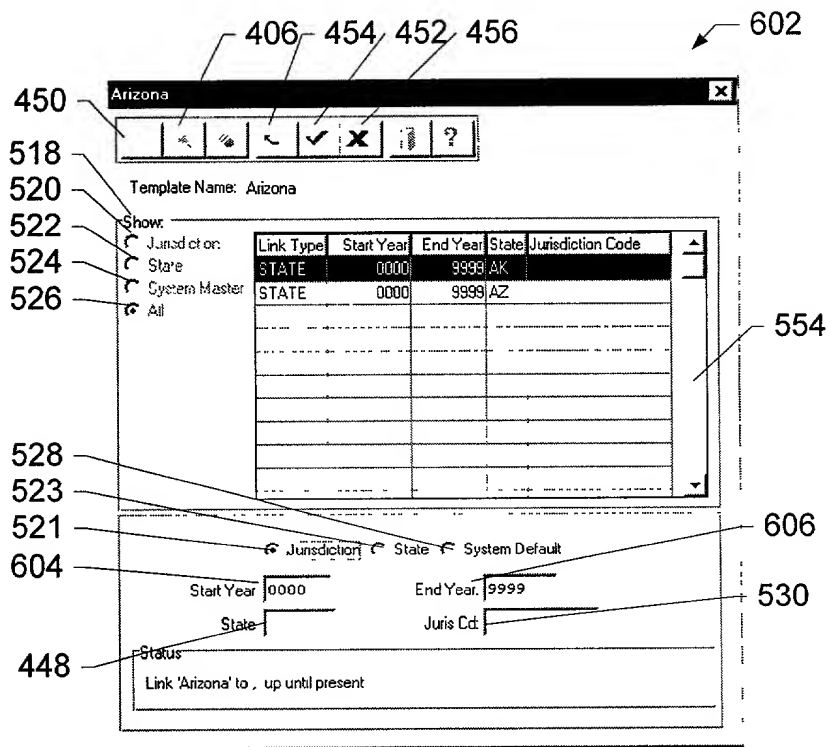


FIG. 33B Tax Calculations



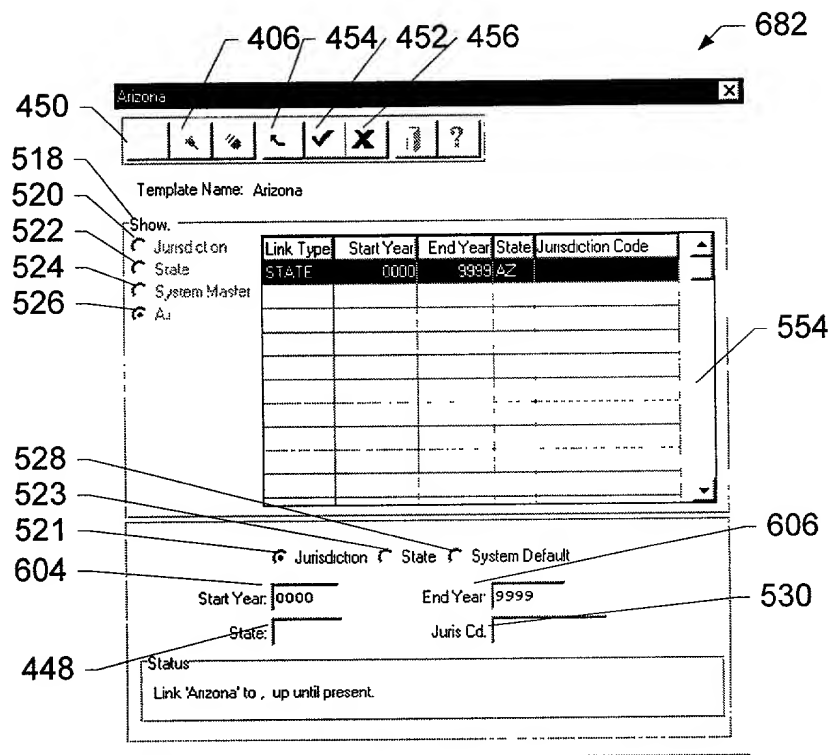


FIG. 36 Installment Templates Link To

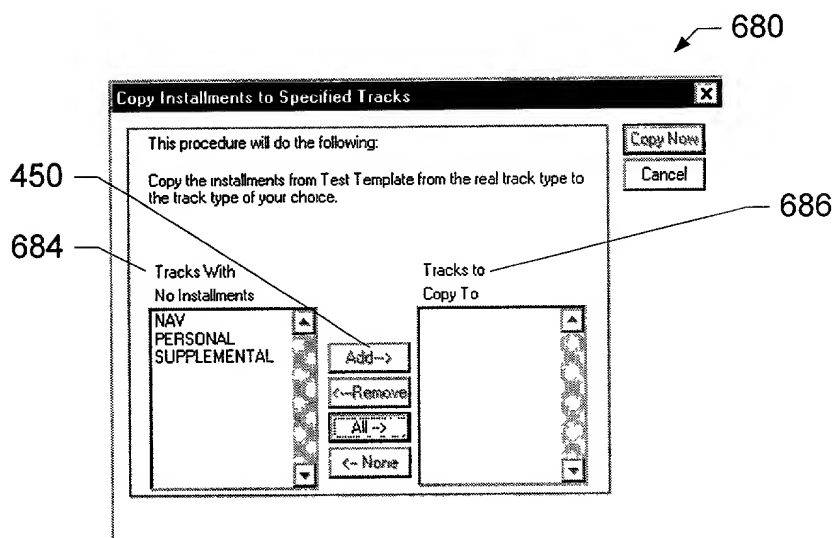
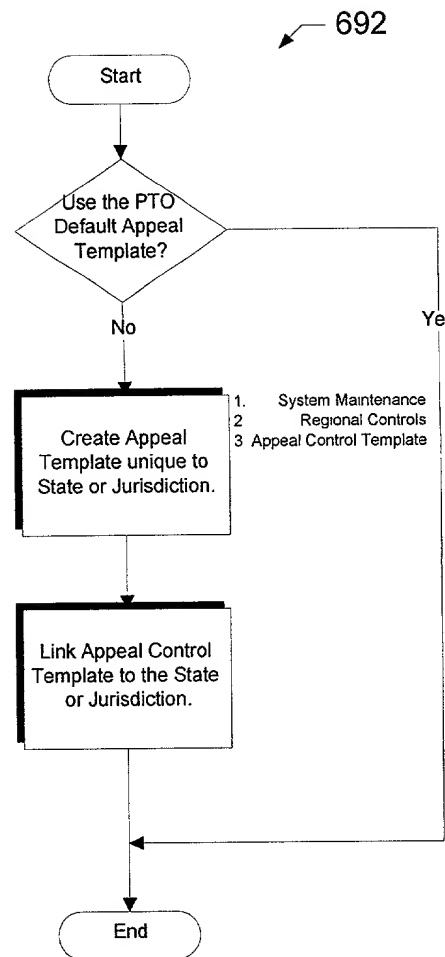
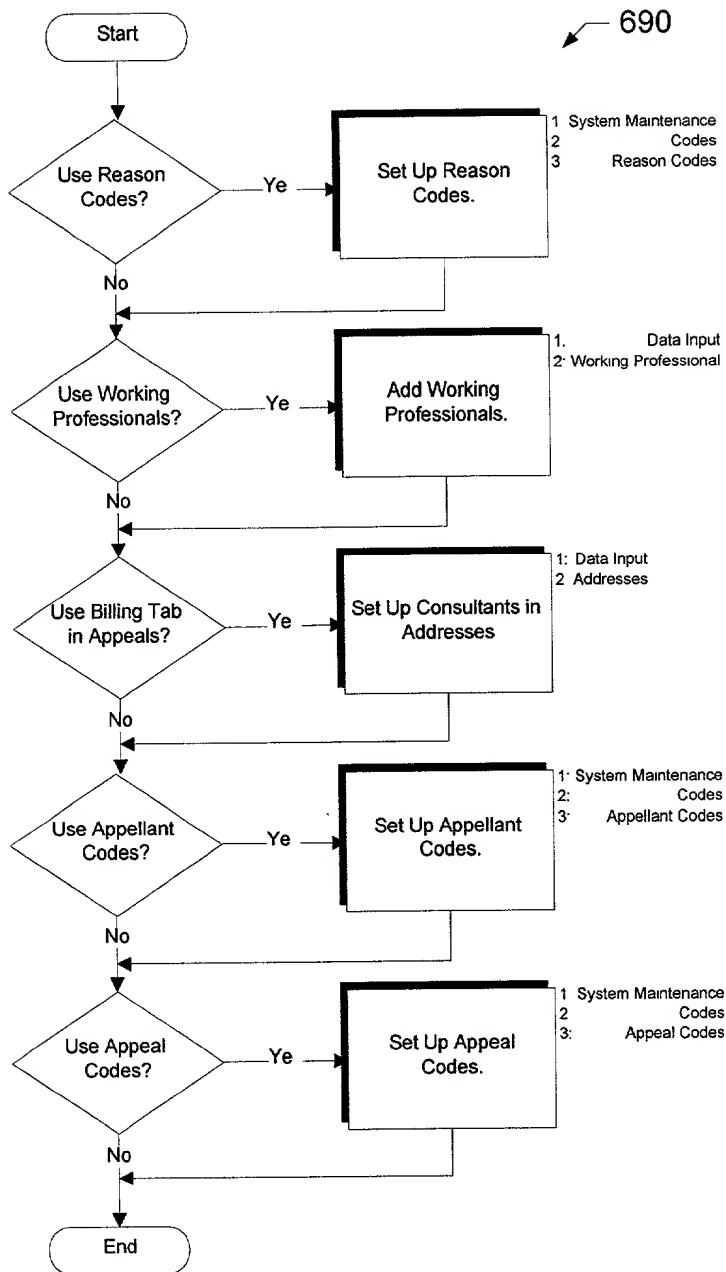


FIG. 37 Copy Installments Dialog Box



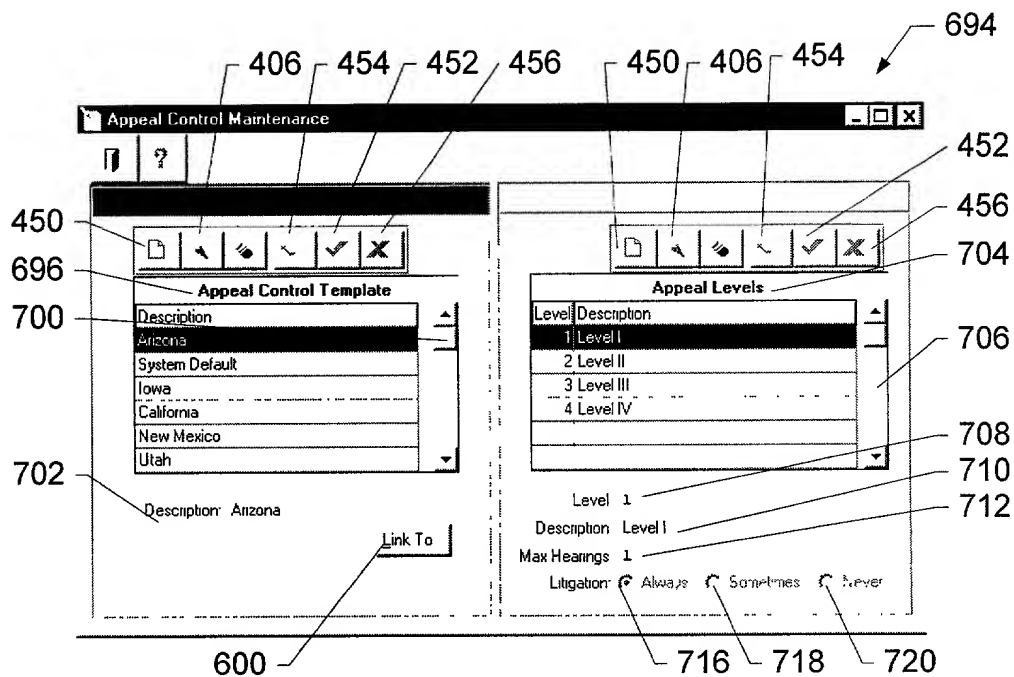


FIG. 40 Appeal Control

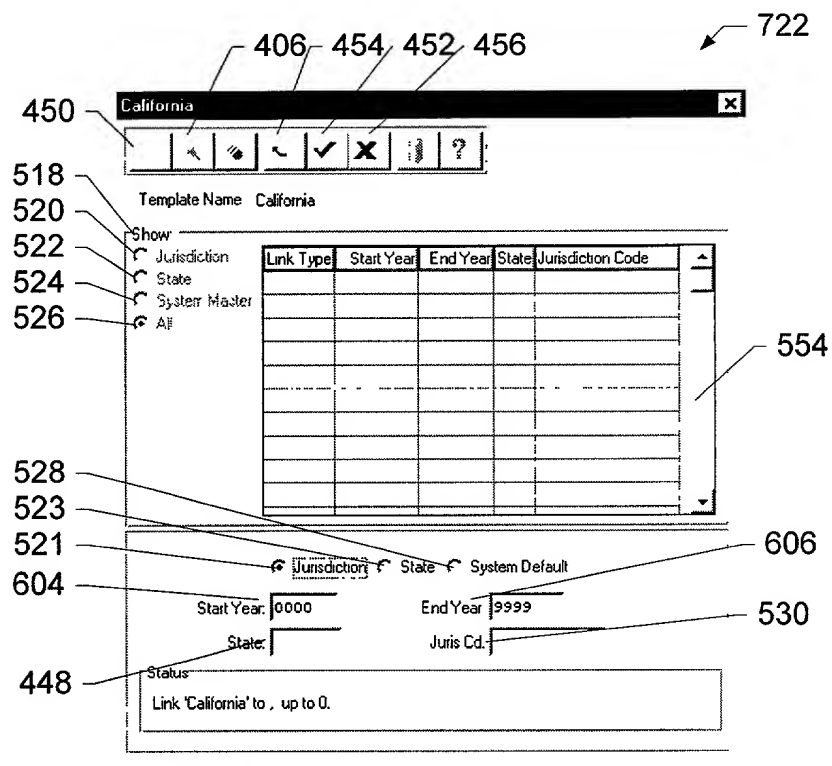


FIG. 41 Appeal Control Link

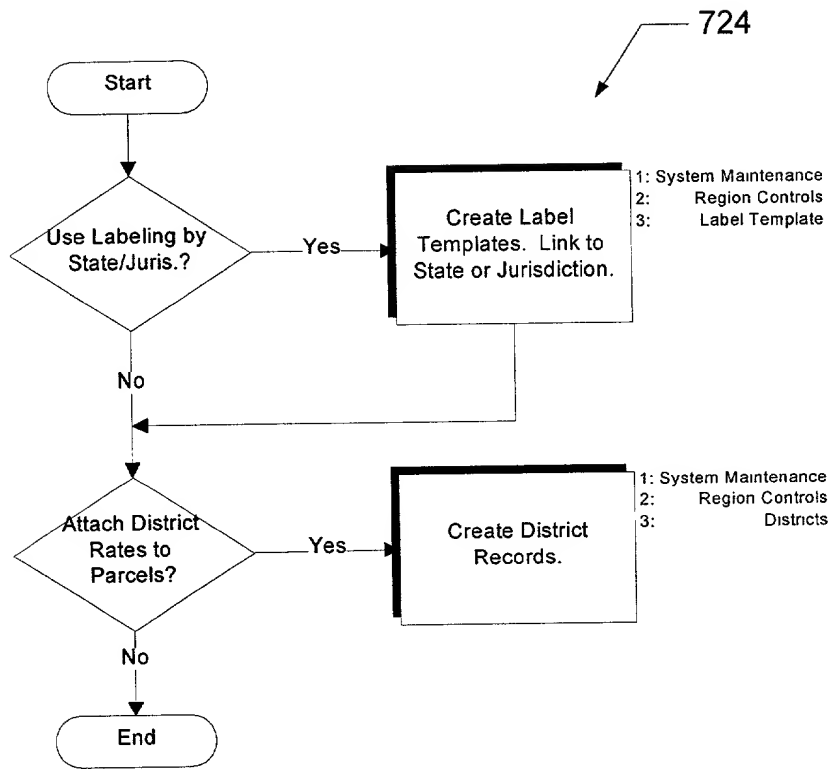


FIG. 42 Dynamic Labeling and Districts

726

731

734

730

732

728

736

740

600

FIG. 43A Label Template

Label	New Label
Asd OV	Asd OV
Asd TV	AV
Asd TV Imp	AV Imp
Asd TV Land	AV Land
Asd TV Imp	AV Imp
Asd TV Land	AV Land
Decision OV Ratio	Decision OV Ratio
Decision OV Ratio	Decision OV Ratio
OV	OV
OV Dst Tax Rate Use	OV Dst Tax Rate Use
OV Dst Tax Rate Use	OV Dst Tax Rate Use
OV ER Treatment	OV Eq Mult
OV ER Tmnt	OV Eq Mult
OV Increase	OV Increase

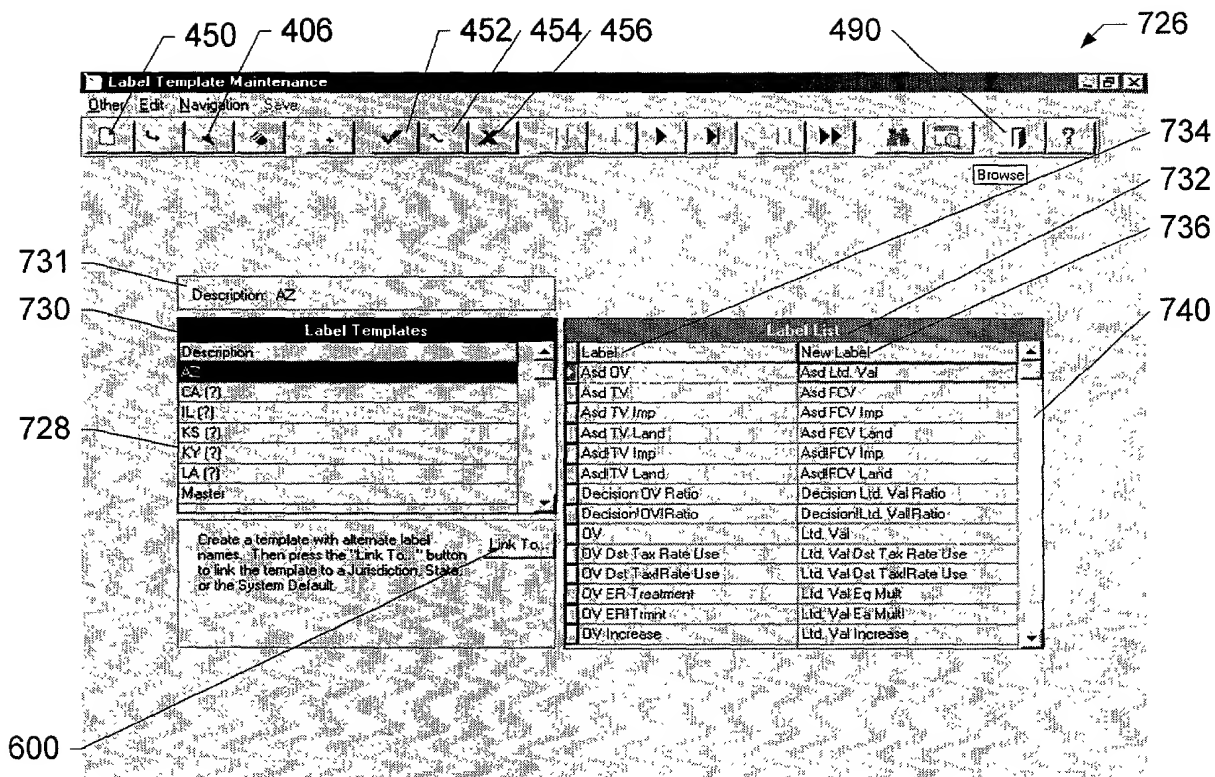


FIG. 43B Label Template

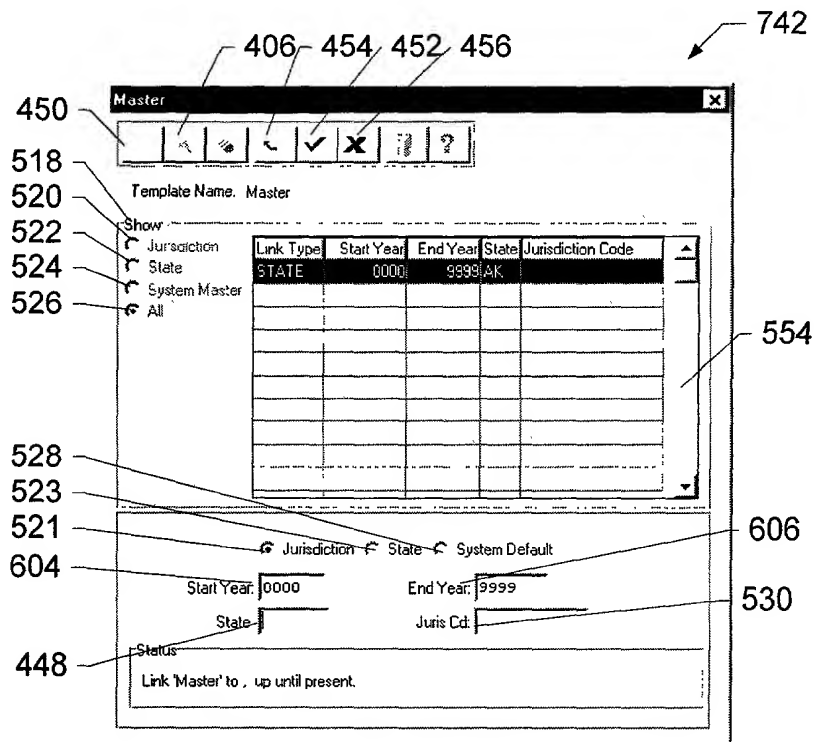


FIG. 44 Label Template Link To

744

Dist Code	Classification	TV Rate	OV Rate
011300	5	0.049993	0.131873
011301	5	0.049993	0.131873
011303	7	0.049993	0.131873
021300	5	0.033276	0.095237
031300	5	0.037463	0.105936
031600	8	0.037028	0.102171
031602		0.037028	0.102171
051300		0.047124	0.143199
061300		0.038875	0.097567

762

456

454

746

Dist Code: Class: [Icons]

748

750

752

754

756

758

760

Dist Code: Description:

Class:

TV Rate:

OV Rate:

☐ Special District

Type:

Use in Update?:

FIG. 45 - District Set Up